

Being a Logistics Solution Partner Increases Truck Owners' Satisfaction and Fosters Loyalty, J.D. Power Finds

Hino Ranks Highest in Both Heavy-Duty and Light-Duty Segments

TOKYO: 18 Dec. 2019 – When truck manufacturers are regarded as logistics solution partners of truck owners, satisfaction and loyalty increases, according to the J.D. Power 2019 Japan Heavy-Duty Truck Ownership Satisfaction StudySM–Wave 2 and the J.D. Power 2019 Japan Light-Duty Truck Ownership Satisfaction StudySM–Wave 2, both released today.

The annual studies, the 15th for heavy-duty trucks and the 14th for light-duty trucks, measure overall satisfaction of commercial fleet owners with manufacturers and their respective authorized truck dealers, including managers of truck freight companies. Satisfaction is determined by examining owners' evaluations of multiple attributes grouped into four factors (listed in order of importance): vehicle (44%); service (23%); sales (21%); and cost (12%). Satisfaction is calculated on a 1,000-point scale.

The following are some key findings of the 2019 studies:

- **Levels of owner satisfaction almost unchanged:** Ownership satisfaction for heavy-duty trucks averages 569 points, an increase of 4 points from the last study published in January 2019, and 548 points for light-duty trucks, a decrease of 2 points.
- **Satisfaction slightly increases in the after-sales service factor:** In the heavy-duty truck segment, the largest improvement is in the after-sales service factor (+11 points from 2018), driven by improvements in the areas of customer response during the ordering process of spare parts and customer treatment for the vehicle maintenance and repair. On the other hand, the level of satisfaction for the facility attribute remains the same in the heavy-truck segment, while decreasing in the light-duty truck segment. In particular, more customers indicate that the facility or showroom was crowded each year—30% for heavy-duty truck customers and 28% for light-duty truck customers.
- **Trucks are being equipped with advanced technologies at a rapid pace:** The studies also examine the installation of advanced technologies, including collision-mitigation braking systems; lane-keeping assist systems; drowsy driver monitoring/weaving alert systems; blind-spot monitoring/warning systems; adaptive cruise control systems; and factory-installed telematics. The studies find that both heavy-duty and light-duty trucks have been increasingly equipped with advanced technologies at a rapid pace during the past three registration years. In particular, 70% or more of heavy-duty trucks and 40% or more of light-duty trucks registered in the past year are equipped with collision-mitigation braking systems and/or lane-keeping assist systems, closing the gap in the percentages between heavy-duty and light-duty trucks.
- **Being regarded as a logistics solution partner increases satisfaction and fosters loyalty:** Since new innovations in the logistics business are receiving increased attention, the study asks truck owners if they consider their truck manufacturer as their logistics solution partner, and only 33% of heavy-duty truck owners and 31% of light-duty truck owners answered that they do. The results indicate that for most truck owners, their truck manufacturer is still just a supplier of trucks, not a business partner who supports them.
- **When truck owners are highly satisfied, their repurchase intent and loyalty increase:** Among truck owners who are highly satisfied (overall satisfaction scores of 700 or higher)

with their trucks, 58% of heavy-duty truck owners and 53% of light-duty truck owners consider their truck manufacturer as their logistics partner. In addition, 96% of these heavy-duty truck owners and 95% of these light-duty truck owners indicate they “definitely would” repurchase from the same OEM, suggesting that customer satisfaction correlates with business growth and loyalty.

Study Rankings

Hino ranks highest in customer satisfaction for the 11th consecutive time in the heavy-duty truck segment (594 points) among the four brands included in the heavy-duty study and for the sixth consecutive time in the light-duty truck segment (575) among the four brands included in the light-duty study. Second place is occupied by **Isuzu** (569) in the heavy-duty truck segment and **Toyota** (574) in the light-duty truck segment.

The 2019 Japan Heavy-Duty Truck Ownership Satisfaction Study is based on 3,367 records from 2,192 truck owners, and the 2019 Japan Light-Duty Truck Ownership Satisfaction Study is based on 2,653 records from 1,850 truck owners. Fleet owners in each segment evaluated up to two manufacturers. The study was conducted by mail in September-October 2019.

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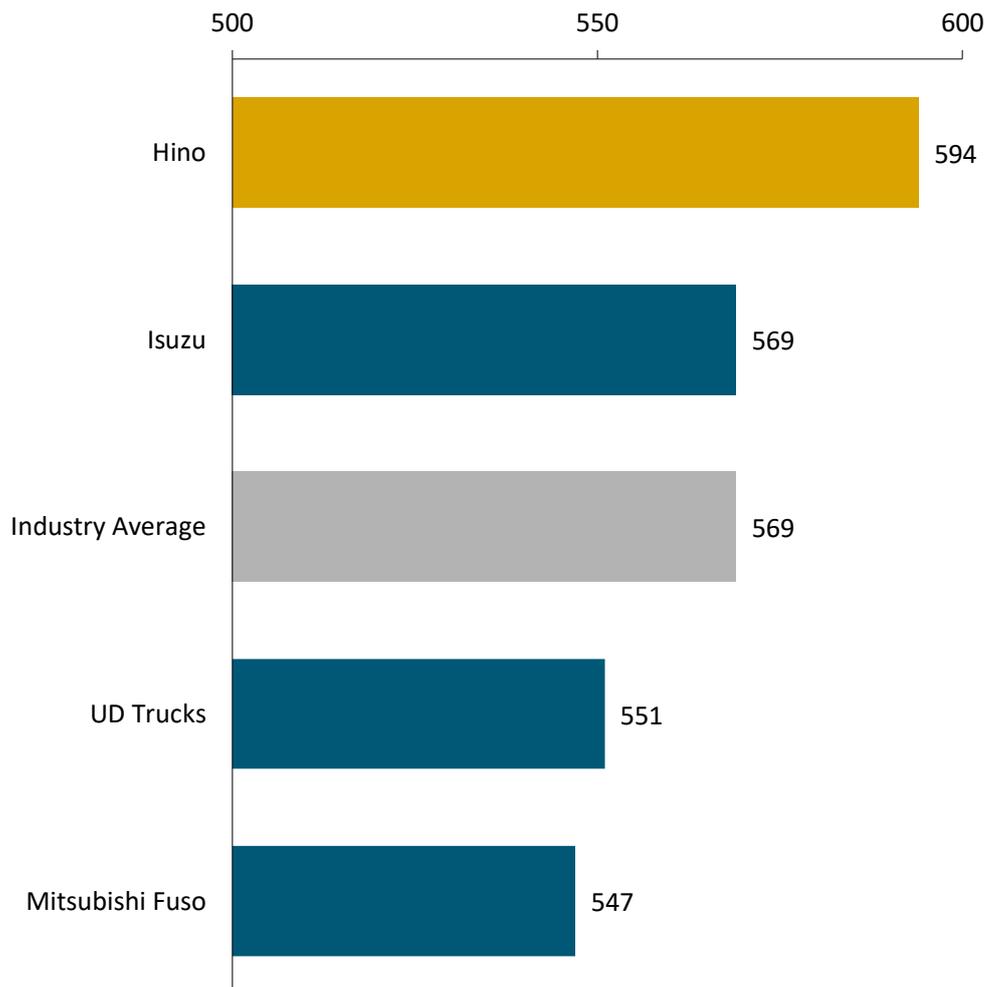
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NOTE: Two charts follow.

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2019 Japan Heavy-Duty Truck Ownership Satisfaction StudySM (Wave 2)

Customer Satisfaction Index Ranking
(Based on a 1,000-point scale)



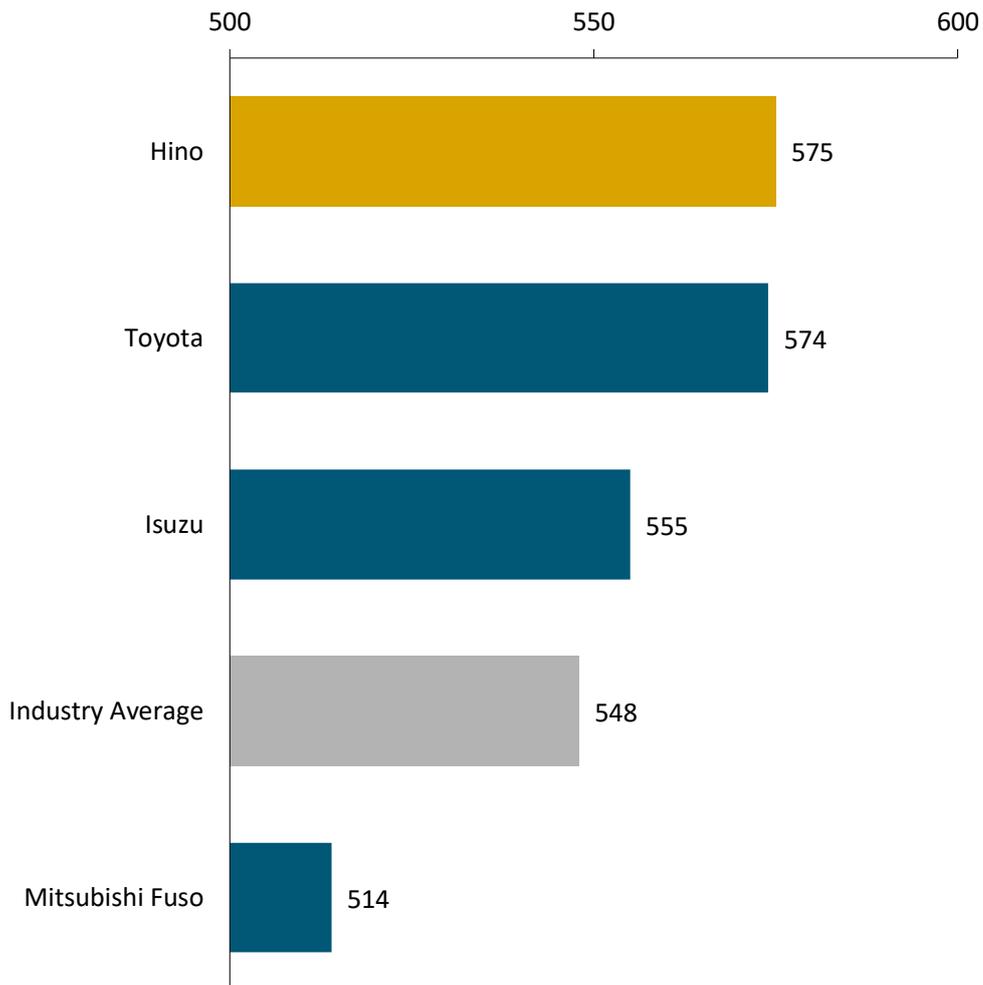
NOTE: Included in the study but not ranked due to insufficient sample size are Mercedes-Benz, Scania and Volvo.

Source: J.D. Power 2019 Japan Heavy-Duty Truck Ownership Satisfaction StudySM (Wave 2)

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2019 Japan Light-Duty Truck Ownership Satisfaction StudySM (Wave 2)

Customer Satisfaction Index Ranking
(Based on a 1,000-point scale)



NOTE: Included in the study but not ranked due to small sample size are Mazda, Nissan and UD Trucks.

Source: J.D. Power 2019 Japan Light-Duty Truck Ownership Satisfaction StudySM (Wave 2)

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